TriLumen Systems

CASE STUDY

Enterprise Workforce · Microsoft Copilot Deployment

Rolling Out Copilot Without Exposing What It Shouldn't

THE CHALLENGE

Turning on Copilot for a large, multi-department workforce without first locking down file permissions is how employees end up accidentally seeing executive salaries and confidential data on day one. At enterprise scale, "just-in-time" permissions are almost always messy, and Copilot will surface anything it can technically reach.

OUR APPROACH

Before a single license got assigned, we ran a full data governance and permission audit, deploying automated scanners to identify over-shared sites, sensitive executive folders, and outdated financial data, then re-scoping those permissions so the system only ever surfaced what a given user was authorized to see.

Sales and service needed fundamentally different builds. For sales, we deployed Copilot as a bridge between email, chat, and the CRM, so reps stopped manually updating pipeline stages, action items and follow-ups now generate themselves from a single prompt. For customer care, we anchored the assistant strictly to verified internal procedures and ticket history, not the open web, so a complex dispute surfaces the exact, correct resolution script in seconds.

Rolling this out to thousands of users only works if people actually use it. We staged the deployment in cohorts and built a champion network, training power users in every department to build workflow-specific prompts, while standing up a usage dashboard for leadership to track real adoption.

THE RESULT

25% → 75%+

Passive usage to monthly active usage

Sales reps stopped manually maintaining CRM records mid-conversation, resolution time on complex customer disputes dropped to seconds, and leadership had a real, measurable view of adoption, not just a license count.

> *"Rolling out Copilot across the company without a permission audit first is a recipe for disaster. TriLumen came in, mapped out our SharePoint boundaries, and made sure executive folders were locked down tight before a single license went live. They worked closely with our department heads to build real habits, so we ended up with actual daily usage instead of just a bunch of unused licenses."*
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